



**BRIEFING PAPER**

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# 16-19 bursaries for further education in England

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## Summary

### Education Maintenance Allowance

Educational Maintenance Allowances (EMAs) were rolled out nationally in September 2004. The aim of EMAs was to broaden participation of young people in 16 - 19 education and to improve retention and attainment. The EMA was designed as a 'something for something' scheme, where students had to show satisfactory progress and attendance to receive their allowance.

Over the years the take up of the EMA and Government spending on the scheme rose significantly. In 2010/11, the last year of the full scheme, approximately 636,000 students received the EMA in England at a cost to the Government of around £564 million. More background information on EMAs can be found in the briefing paper [Education Maintenance Allowance \(EMA\) Statistics](#).

EMAs were extensively evaluated to ascertain their effectiveness. Studies showed that they had a positive impact on retention of students, but less impact on achievement.

### Withdrawal of EMAs and replacement with new 16-19 bursary scheme – September 2011

In October 2010 the Coalition Government announced that EMAs would be abolished and replaced by a more efficient, targeted scheme. The new 16 – 19 bursary scheme was introduced from September 2011. The value of this replacement scheme stood at around £180 million in both 2014-15 and 2015-16. This was less than one third of the level of spending on EMAs in cash terms.

The introduction of the new 16-19 bursary system was closely followed by the phased implementation of another reform, known as raising the participation age, or RPA. This reform meant that those finishing compulsory schooling (year 11) in summer 2013 were required to stay in some form of education or training for an additional year. The participation age was raised to 18 for those finishing year 11 in summer 2014.

### Who can receive 16-19 bursaries?

There are two different types of bursary:

- *Discretionary bursaries*: as the name suggests, there is no fixed level of support, and institutions set eligibility criteria and support type (e.g., cash or in-kind help). They are designed for young people facing financial barriers to participation and needing help to stay on in education.
- *Vulnerable student bursaries* of up to £1,200. These can be paid to: young people in care; care leavers; and those in receipt of certain social security benefits in their own right.

Evaluation commissioned by the Department for Education (DfE) and published in 2014 found that the amount of discretionary bursary spend per student in 2013/14 varied considerably, from £60 to around £4,000. The median level of spending per student in 2013/14 was £447.

### What impact has the 16-19 bursary scheme had, and how is it working in practice?

Researchers have tried to estimate the impact of replacing EMAs with the 16-19 bursary scheme, and to assess how the new scheme is itself working. DfE-commissioned

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evaluation suggested that replacing EMAs with 16-19 bursaries was associated with a relatively modest decrease in participation and attainment in the first two years of the scheme's operation. However, this disproportionately affected low-income young people.

The 16-19 bursary scheme allows providers a high degree of discretion in terms of who receives support, and what kinds of support. A second DfE-commissioned evaluation found that most providers thought the bursary was a positive thing; however, there was a lack of consistency between providers in terms of what was offered, and when. Awareness about bursary support was high (at 71% of students undertaking post-16 study) but it was lower at the point when young people were considering their options for post-16.

Analysis by the National Audit Office (NAO) published in September 2014 concluded that although the Coalition Government reduced financial support for 16-18 year olds, the new bursary fund targeted the remaining funding better.

### **Scope of this briefing paper**

This note relates principally to England, but includes some brief information about the continuing EMA schemes in Scotland, Wales and Northern Ireland.

# 1. 16-19 Bursaries in England

On 28 March 2011 the then Secretary of State for Education, Michael Gove, made a Statement in the House on [Post 16 funding](#),<sup>1</sup> in which he announced that a new bursary scheme would be introduced for 16 – 19 year olds to replace the Education Maintenance Allowance (EMA) in England:

Twelve thousand students, those in care, care leavers and those receiving income support, including the severely disabled, should in future all receive an annual bursary of £1,200 if they stay on in education—more every year than they ever received under EMA.

I also propose that those most in need who are currently in receipt of EMA be protected. All young people who began courses in 2009-10 and who were told that they should receive EMA will still receive their weekly payments. Young people who started courses in the 2010-11 academic year and received the maximum weekly payment of £30 should now receive weekly payments of at least £20 until the end of the next academic year.

In addition, those students will be eligible for support from an entirely new post-16 bursary scheme. Our scheme will help to ensure that the costs of travel, food and equipment for poorer students are properly met, so that no one is prevented from participating through poverty. One hundred and eighty million pounds will be available for that bursary fund, which is enough to ensure that every child eligible for free school meals who chooses to stay on could be paid £800 per year—more than many receive under the current EMA arrangements.

Schools and colleges will have the freedom to decide on the allocation of the bursary. They are best placed to know the specific needs of their students, and we will give professionals full flexibility over allocating support. We will now consult on the implementation of the new scheme, so that allocations can be made for the new arrangements to come into effect from this September.

The scheme was subsequently introduced from September 2011.

The introduction of the new 16-19 bursary system was closely followed by the implementation of another reform, known as raising the participation age, or RPA. This meant that those finishing school year 11 in summer 2013 were required to stay in some form of education or training for a further year. The participation age was raised to 18 for those finishing year 11 in summer 2014 or after.

## 1.1 Details of the current 16-19 Bursary scheme in England

There are two types of 16-19 bursary in England:

- Discretionary bursaries; and
- Vulnerable student bursaries of up to £1,200 per year.

### **EMA in England:**

This was a means-tested cash allowance for 16-19 year olds, paid on a sliding scale up to a maximum of £30 per term-time week. It was withdrawn in 2011 – see Annex A for further details.

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<sup>1</sup> HC Deb 28 March 2011 c51-54: [Post-16 education funding](#)

Both types of bursaries are administered by schools and colleges, and support may be provided in cash or in kind.

The DfE provides guidance to schools and colleges about operating and administering their bursary schemes:

- [Link to DfE provider guidance, '16 to 19 Bursary Fund guide: 2017 to 2018', updated 2 March 2017.](#)

### Discretionary bursary

For discretionary bursaries, as the name implies, the school or college sets the level of benefit and determines the detailed eligibility criteria, taking account of basic national criteria set by the Education Funding Agency (EFA).

This is a key difference with the old EMA scheme, which had nationally-defined levels of benefit linked to nationally-determined household income and other eligibility criteria.

The DfE provider guidance outlines the basic eligibility criteria for discretionary bursaries in 2017-18:

To be eligible for the bursary students must:

- be aged 16 or over but under 19 at 31 August 2017 or
- be aged 19 or over at 31 August 2017 and have an Education, Health and Care Plan (EHCP)
- be aged 19 or over at 31 August 2017 and continuing on a study programme they began aged 16 to 18 ('19+ continuers')
- meet the residency criteria in EFA 2017 to 2018 academic year funding regulations for post-16 provision
- be participating in provision that is subject to inspection by a public body which assures quality (such as Ofsted), the provision must also be either
- funded directly by EFA or by EFA via a local authority
- otherwise publicly funded and lead to a qualification (up to and including Level 3) accredited by Ofqual or pursuant to Section 96 or the Learning and Skills Act 2000
- a 16 to 19 traineeship programme

Schools, colleges and training providers will then determine and apply their own eligibility criteria on top of these – for example, they may use household income thresholds or bands, eligibility for free meals, and/ or take account of students' personal circumstances, such as whether they have caring responsibilities.

Total expenditure on discretionary bursaries was £180 million in 2014-15 and £182 million in 2015-16.<sup>2</sup> The Government does not publish data on take-up of these bursaries. Research commissioned by the Government put the estimated number of discretionary bursaries in 2012/13 at around 360,000 or 23% of the cohort in education and

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<sup>2</sup> DfE Annual report and accounts, various years.

work based learning.<sup>3</sup> This number was around 56% of those in receipt of EMA in 2010.

Funding is allocated to individual schools and colleges to distribute to students under their own criteria. For most institutions this funding is calculated by applying their EMA eligible student rate from 2009/10 to their latest student numbers and, in 2016/17, multiplying by £298 to their total allocation.<sup>4</sup> In 2014/15 direct funding for free meals in further education was introduced to give parity with those attending school sixth forms. In 2016/17 £15 million was removed from discretionary bursary funding to balance out this direct funding which was previously supported on a discretionary basis through the 16-19 bursary fund.<sup>5</sup>

### **Will a particular student be eligible for a discretionary bursary?**

Constituents can check with their (prospective) school, college or learning provider whether they are likely to be eligible for a discretionary bursary, and if so how much or what kind of support will be provided.

The EFA says that providers should make information available to students and others:

Institutions should publish a statement setting out how they will use their bursary fund. The statement should be published early enough for students to be able to use the information when deciding which post-16 institution to attend. The institution's eligibility criteria must be clear and available to students and to EFA. The statement should clearly set out what type of help is being offered, for example, help with transport, books and equipment, field trips and other course-related costs and whether bursary support is available to contribute to the costs of attending university interviews and open days.

Institutions should ensure that information about bursary funding – whether printed or on their websites - is kept up to date.<sup>6</sup>

### **Vulnerable student bursary**

This bursary of up to £1,200 per year may be claimable by young people in qualifying education, training or work experience and who are:

- In care;
- Care leavers;
- In receipt of Income Support, or Universal Credit in place of Income Support, in their own right;
- In receipt of Employment and Support Allowance or Universal Credit and Disability Living or Personal Independence Payments in their own right.

Institutions can top up vulnerable student bursaries from their main discretionary bursary allocation, if they think this is needed and if funds are available.

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<sup>3</sup> Department for Education, [The 16 to 19 bursary fund: impact evaluation Research report](#), June 2015

<sup>4</sup> [School sixth-form allocation statement - academic year 2016 to 2017](#), DfE

<sup>5</sup> [16 to 19 funding allocations: 2016 to 2017 academic year](#), DfE

<sup>6</sup> Gov.uk, ['16 to 19 Bursary Fund guide: 2017 to 2018 academic year'](#), 2 March 2017.

The EFA funding guidance for 2017/18 says that there may be some otherwise qualifying young people who don't require a vulnerable student bursary:

*Young people in the defined vulnerable groups who don't require bursary funding*

There can be cases where a young person is eligible for a vulnerable bursary because they are in one or more of the defined vulnerable groups, but their financial needs are already met and/or they have no relevant costs.

For example:

- a student is attending specialist residential provision where all their educational costs are covered
- a student is taking a distance learning programme and has no barriers to participation (such as no transport costs or meal costs)
- a student is in local authority care and all their educational costs are covered by the local authority

If a student in these circumstances still wants to claim a vulnerable student bursary, institutions can decide to award a reduced bursary or no bursary at all, reflecting their particular circumstances. If an institution decides to do this, they must ensure they explain why to all relevant parties.<sup>7</sup>

In 2016, the Learning and Work Institute (LWI) called for young carers to be classified as 'vulnerable students' and therefore eligible for the vulnerable bursary.<sup>8</sup> From 2016-17, the EFA's guidance on the bursaries has included specific reference to young carers, and the need to ensure they are supported during their studies.

Again there are no routine data published on the take-up of these bursaries. Research commissioned by the Government put their number at 23,900 at a cost of £23.5 million. The largest group receiving vulnerable student bursaries were those in receipt of Income Support (41%), followed by those in care (37%), care leavers (15%) and those receiving Disability Living Allowance and/or Employment Support Allowance (8%).<sup>9</sup>

## 1.2 Resolving disputes about bursary entitlement

The EFA provides the following advice on how students can complain if they feel they have been wrongly refused a bursary, or feel the institution's policy hasn't been followed:

If a student is unhappy with the way their application for Bursary Fund support has been handled by the institution, they should follow the institution's own complaints procedure.

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<sup>7</sup> Gov.uk, '[16 to 19 Bursary Fund guide: 2017 to 2018 academic year](#)', 2 March 2017.

<sup>8</sup> '[We need to stop young adult carers feeling trapped and hopeless](#)', in the Times Educational Supplement, 23 March 2016.

<sup>9</sup> Department for Education, '[The 16 to 19 bursary fund: impact evaluation Research report](#)', June 2015



Bursaries are administered by institutions and local authorities. EFA does not have a role in this, and does not usually get involved with complaints. EFA may only get involved if the allegation is that this guide is being seriously disregarded.

The escalation of complaints about the bursary fund should be handled in the same way as any other complaint to an institution. Institutions must have their own procedures in place, which must be exhausted before EFA is approached.<sup>10</sup>

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<sup>10</sup> Department for Education Gov.uk guidance, '[16 to 19 Bursary Fund guide: 2016 to 2017](#)', updated 21 December 2016.

## 2. Impact of 16-19 bursary scheme

### Institute of Fiscal Studies and Institute of Education financial modelling

In June 2015, the DfE published a final statistical impact evaluation report on the introduction of 16-19 bursaries. This was compiled by researchers from the Institute for Fiscal Studies (IFS) and the Institute of Education (IoE). It looked at the impact of replacing EMA on both participation rates and attainment, and provided some cost-benefit analysis of the new bursaries:

- [Link to IFS/ IoE report, The 16 to 19 bursary fund: impact evaluation](#)

The report found that over the first two years of 16-19 bursaries there was an estimated fall in participation among year 12 students of 1.6 percentage points (from 82.1% to 80.5%) for those who would otherwise have received a full EMA. The effect was smaller among the wider group previously eligible for any support under EMA at 1.4 percentage points and 0.9 points across the whole cohort. All these impacts were statistically significant.

There were also statistically significant falls in estimated attainment at age 18. For level 2<sup>11</sup> these were 2.3 and 1.8 percentage points among the full- and any-EMA groups respectively. The impacts on attainment at level 3<sup>12</sup> by age 18 were smaller and not significant for the any-EMA group.

The authors, Jack Britton and Lorraine Dearden (Institute for Fiscal Studies [IFS] and Institute of Education respectively), concluded that:

The estimates presented here [in the report] suggest that abolishing EMA and introducing the 16 to 19 Bursary Fund had a relatively modest effect on participation and attainment in the first two years of implementation, but that this disproportionately affected low-income young people.<sup>13</sup>

However, they also warned that the overall impact estimates presented in their report were likely to “underestimate the true impacts of the policy reform in question” for a variety of reasons.<sup>14</sup>

On the issue of whether replacing EMAs with 16-19 bursaries represented a saving to the exchequer in the short- and long-run, the researchers concluded that:

[O]ur cost– benefit analysis estimates that the long-run costs from the policy outweigh the short-run savings, and that is without taking into account wider impacts of the policy, including the effects on productivity, crime or health. Of course, the analysis does not account for the economic benefits that accrue from alternative investments of the short-run savings. Those alternatives

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<sup>11</sup> Equivalent to five or more GCSEs at grades A\* to C.

<sup>12</sup> Equivalent to two or more A levels at grades A\* to E.

<sup>13</sup> Department for Education, [The 16 to 19 bursary fund: impact evaluation Research report](#), June 2015, p12.

<sup>14</sup> *Ibid.*

should be examined with a similar approach to that used here in order to assess their relative cost effectiveness.

## **NATCEN process evaluation of 16-19 bursary scheme, June 2015**

Separately, the DfE commissioned a series of annual evaluations looking in detail about how the 16-19 bursaries were working in practice. These considered the number and type of young people who'd applied and received the two different sorts of bursary. It also looked at perceived impact, and analysed the methods providers had used to disburse funds.

The final third year report was published in July 2015.<sup>15</sup> The researchers concluded that in the third year of the scheme's operation, most recipients and providers viewed the financial support available positively. However, there were concerns about inequalities in terms of what was available at different providers, and whether the funding was sufficient to support full participation post-16.

Detailed findings included:

### **On awareness, and level of support:**

- Awareness of the bursary scheme was generally high, with 71% per cent of learners knowing about it. However, this figure was lower at the point where young people were deciding what to do post-16. Only 36% had heard about the bursary before finishing year 11.<sup>16</sup>
- Around 23% of the 16-18 year olds in education and work based training in 2012/13 were receiving some discretionary bursary support.
- The median discretionary bursary spend was £447 per student in 2013/14 but this disguised a wide range from £60 up to £4000 per student.
- Around 1.8% of the 16-19 cohort at school sixth forms and further education colleges were receiving vulnerable student bursaries in 2013/14. Spending on vulnerable bursaries in this year amounted to £23.5 million.<sup>17</sup>

### **On administration:**

- Providers administering their own bursaries liked the flexibility in the system, but the potential for inequalities was cited as a drawback.
- Compared to those receiving 'in kind' support, young people receiving cash payments were more likely to say the bursary had changed their behaviour.
- In the third year of the scheme's operation (2013/14) just under half of providers reported delays in making bursary payments.

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<sup>15</sup> NatCen for the Department for Education, [The 16 to 19 bursary fund: year 3 process evaluation](#), June 2015.

<sup>16</sup> *Ibid.*, p13.

<sup>17</sup> *Ibid.*

**On impacts:**

- 83% of providers thought bursaries had a positive impact on participation.
- 28% of recipients said they would not have been able to stay in education at all without support.
- While 75% of recipients said they were better able to cope owing to the bursary, around 35% of recipients thought they did not get enough to make a difference.
- 80% of providers thought the bursary fund was effectively targeting young people who needed it, but around 9% of young people who weren't in receipt of a bursary felt they were in danger of dropping out owing to the costs of study.

## 2.1 National Audit Office report on 16-18 education – September 2014

In September 2014, the National Audit Office (NAO) published the results of a value-for-money inquiry into 16-18 education in England: <sup>18</sup>

- [Link to NAO report on 16-18 education, published September 2014](#)

This concluded that although the Coalition Government had reduced financial support for 16-18 year olds, the new bursary fund targeted the remaining funding better.<sup>19</sup>

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<sup>18</sup> National Audit Office (NAO), [16- to 18-year-old participation in education and training](#), September 2014.

<sup>19</sup> *Ibid.*, p9.

## 3. EMAs in Wales, Northern Ireland and Scotland

EMA schemes are still in place in other parts of the UK. Eligibility conditions for the three different schemes vary slightly.

### Wales

EMAs in Wales are administered by [Student Finance Wales](#). A booklet gives full details on eligibility criteria, payment amounts, and the application process:

- [Link to Student Finance Wales publication, 'Little Book of EMA – All you need to know about EMA for academic year 2017/18'](#).

### Scotland

Details about eligibility for EMA in Scotland can be found using the link below:

- [Link to MyGov.uk guidance, 'Apply for or renew an Education Maintenance Allowance \(EMA\)'](#).

### Northern Ireland

In Northern Ireland, the scheme is known as the Money to Learn Education Maintenance Allowance. The NI Direct website provides guidance on eligibility criteria:

- [Link to NI Direct website guidance, 'Money to Learn Education Maintenance Allowance \(EMA\)'](#)

## 4. Annex A: A brief history of the Education Maintenance Allowance (EMA) in England

### 4.1 National roll-out of EMAs in England in September 2004

Educational Maintenance Allowances (EMAs) were introduced as a pilot scheme by the Labour Government in 1999, and were rolled out nationally in September 2004. The aim of EMAs was to broaden participation of young people in 16 - 19 education and to improve retention and attainment. The EMA was designed as a 'something for something' scheme, where students had to show satisfactory progress and attendance to receive their allowance.

Over the years the take up of the EMA and Government spending on the scheme rose significantly. In 2010/11, the Government allocated around £564 million to the scheme, and around 636,000 students were eligible for some level of EMA support.<sup>20</sup>

EMAs were extensively evaluated to ascertain their effectiveness and studies showed that they had a positive impact on retention of students, but less impact on achievement.

A historical Commons Library briefing paper provides statistical background on the EMA:

- [Link to Commons Library briefing paper, Education Maintenance Allowance \(EMA\) statistics.](#)

### 4.2 Abolition of the EMA

The then Coalition Government announced in the Spending Review 2010 that EMAs would cease, in England, at the end of the academic year 2010/11. There were transitional arrangements to safeguard those students already receiving EMAs.

The decision to end the EMA was discussed in a report by the House of Commons Education Committee in July 2011, [Participation by 16-19 year olds in education and training](#):<sup>21</sup>

The sudden decision to bring an end to the Education Maintenance Allowance was controversial, and a vigorous campaign for retention of the Allowance followed. The vast majority of submissions to our inquiry commented on the Government's decision, and almost all were opposed. Large numbers of young people and their parents contacted the Committee directly, giving reasons why they believed that it was essential to retain the EMA. We were told that the Allowance was used by students to meet the cost of travel, computers and

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<sup>20</sup> PQ [HL 3320, 9 December 2014](#); HC Deb [18 November 2013, c733W](#)

<sup>21</sup> Education Committee [Participation by 16-19 year olds in education and training](#) Fourth Report of Session 2010-12 HC 850

internet access, food, and necessary equipment and protective clothing (in some cases several hundreds of pounds).

We were also told that:

- The EMA was a necessity for some, not a luxury. For example, one student “was constantly on the edge; if her EMA was late she couldn’t afford her fare”;
- The EMA provided an incentive to attend college on time and to focus on studying. The loss of EMA could result in behavioural issues for those who lose that focus;
- The EMA had enabled students to attend their first choice of provision, rather than the closest;
- The EMA was part of the household income, used to help with the cost of household bills;
- The EMA had improved students’ retention and attendance (this is covered in more detail below, in paragraphs 94 to 99);
- The EMA enabled low income families to see further education as an option for them, and the lack of guaranteed funding as a ‘safety net’ would deter some young people from applying for courses;
- The EMA released young people from dependence on their parents, who might not otherwise have provided the financial support necessary (particularly where more than one child was in post-compulsory study);
- • A large proportion of students with learning difficulties came from low income households and would be disproportionately affected by withdrawal of the EMA;
- Young carers, who are less likely to enter further education because of their caring responsibilities, would be adversely affected;
- Young refugees and migrants, who experienced high levels of poverty and need, faced particular barriers to education: EMA had been “a vital resource” to young Roma;
- The loss of the EMA would mean that less well-off students might need to take part time jobs, which would reduce their study time and put them at a disadvantage to better off students. Students from Brooke House Sixth Form College in Hackney reported difficulties in finding part-time employment;
- The EMA allowed young people to set and manage their own budget, developing their financial skills; and
- The EMA provided a means for some young people to participate in extracurricular activities that would enhance their university application. [...]

Peterborough City Council’s 8–19 Service listed many negative impacts of the loss of the EMA. However, it said that “one positive aspect of the removal of EMA” was that “we are no longer artificially trying to construct provision that meets EMA criteria. Our most vulnerable learners often require flexible, short or small programmes to entice them in to learning. Only after their confidence grows will they commit to 12 hours a week or a programme spread over a number of weeks. EMA was often a

barrier to being truly flexible to meet learner needs, as we had to try to get young people to attend larger programmes that did not meet their needs".<sup>22</sup>

The report made the following statement on the abolition of the EMA:

We would have welcomed a more measured and public analysis by the Government before it reached its decision to abolish the EMA. The Government's assertion is that there was a substantial economic "deadweight" cost element to the EMA, meaning that a significant proportion of young people would have taken courses whether or not they received the EMA. However, economic "deadweight" costs are a feature of many interventions and do not necessarily mean that the policy is invalidated. The Government should have done more to acknowledge the combined impact on students' participation, attainment and retention, particularly amongst disadvantaged sub-groups, before determining how to restructure financial support.<sup>23</sup>

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<sup>22</sup> Education Committee [Participation by 16-19 year olds in education and training](#) Fourth Report of Session 2010-12 HC 850, pp32-3.

<sup>23</sup> *Ibid.*, pp38-9



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